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## Slovakia

### Product Brief

### Fish and Seafood

**2007**

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**Report Highlights:**

The fish and seafood market in Slovakia has been on the rise and has become open to new and more expensive kinds of fish and seafood. Retail sales are still quite price sensitive, dominated mainly by frozen fish filets and chilled fish salads. Import conditions for U.S. products are good, as there are no trade barriers. Competition is growing, however, the market is still not fully saturated.

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## I. MARKET OVERVIEW

The market for frozen fish and seafood in Slovakia has been steadily growing, whereas the fresh fish market encountered a slight decline. However, there's been a significant growth in both, fresh crustaceans and mollusks-cephalopods markets. Crustaceans and mollusks with cephalopods reached almost 10% share on the total fresh and chilled fish and seafood market.

Imports of fish and seafood have been soaring, over the past two years the total value of imports of fish and seafood doubled. U.S. imports are rising even faster, increasing their value three times from 600 to 1,812 thousand USD, according to Global Trade Atlas Statistics.

| Slovakia Import Statistics  |                                 |             |             |
|---|---------------------------------|-------------|-------------|
| Commodity: 03, Fish And Crustaceans, Mollusks And Other Aquatic Invertebrates |                                 |             |             |
| Year To Date: January - December  |                                 |             |             |
| Partner Country   | Thousands United States Dollars |             |             |
|   | 2004                            | 2005        | 2006        |
| World   | 24817                           | 31094       | 49811       |
| Czech Republic  | 8107                            | 10282       | 14712       |
| Tanzania  | 0                               | 2897        | 13604       |
| Germany   | 3363                            | 4507        | 6004        |
| China   | 2350                            | 2186        | 3407        |
| Denmark   | 1093                            | 1344        | 2455        |
| <b>United States</b>  | <b>600</b>                      | <b>1278</b> | <b>1812</b> |
| Argentina   | 1415                            | 1063        | 1442        |
| Ireland   | 1543                            | 1352        | 1314        |
| Poland  | 823                             | 1040        | 1196        |
| Russia  | 764                             | 817         | 1189        |

Imports according to quantity are on the rise as well:

| Slovakia Import Statistics  |           |                    |          |          |
|---|-----------|--------------------|----------|----------|
| Commodity: 03, Fish And Crustaceans, Mollusks And Other Aquatic Invertebrates |           |                    |          |          |
| Year To Date: January - December  |           |                    |          |          |
| Partner Country   | Unit      | Thousands Quantity |          |          |
|   |           | 2004               | 2005     | 2006     |
| World   | MT        | 15                 | 14       | 18       |
| Czech Republic  | MT        | 4                  | 4        | 5        |
| Germany   | MT        | 2                  | 2        | 3        |
| Tanzania  | MT        | 0                  | 1        | 3        |
| China   | MT        | 1                  | 1        | 2        |
| Denmark   | MT        | 1                  | 1        | 1        |
| <b>United States</b>  | <b>MT</b> | <b>0</b>           | <b>1</b> | <b>1</b> |
| Ireland   | MT        | 2                  | 1        | 1        |
| Argentina   | MT        | 1                  | 1        | 1        |

|                |    |   |   |   |
|----------------|----|---|---|---|
| United Kingdom | MT | 0 | 0 | 0 |
| Norway         | MT | 0 | 0 | 0 |

Compared to imports, exports of fish and seafood are not very significant, as Slovakia is a landlocked country:

| Slovakia Export Statistics  |                                 |      |      |
|---|---------------------------------|------|------|
| Commodity: 03, Fish And Crustaceans, Mollusks And Other Aquatic Invertebrates |                                 |      |      |
| Year To Date: January - December  |                                 |      |      |
| Partner Country   | Thousands United States Dollars |      |      |
|   | 2004                            | 2005 | 2006 |
| World   | 4730                            | 5552 | 7804 |
| Czech Republic  | 2539                            | 2470 | 4607 |
| Hungary   | 1393                            | 1932 | 2109 |
| Italy   | 444                             | 349  | 409  |
| Poland  | 128                             | 145  | 358  |
| Austria   | 56                              | 248  | 216  |
| Ukraine   | 3                               | 21   | 66   |
| Germany   | 113                             | 378  | 12   |
| Croatia   | 17                              | 0    | 10   |
| Belgium   | 5                               | 0    | 6    |
| Switzerland   | 11                              | 8    | 5    |
| Cyprus  | 0                               | 0    | 5    |
| Thailand  | 0                               | 0    | 0    |
| Slovenia  | 8                               | 0    | 0    |
| Canada  | 0                               | 0    | 0    |
| Denmark   | 13                              | 0    | 0    |

| Slovakia Export Statistics  |      |                    |      |      |
|---|------|--------------------|------|------|
| Commodity: 03, Fish And Crustaceans, Molluscs And Other Aquatic Invertebrates |      |                    |      |      |
| Year To Date: January - December  |      |                    |      |      |
| Partner Country   | Unit | Thousands Quantity |      |      |
|   |      | 2004               | 2005 | 2006 |
| World   | T    | 0                  | 1    | 2    |
| Czech Republic  | T    | 0                  | 1    | 1    |
| Hungary   | T    | 0                  | 0    | 0    |
| Poland  | T    | 0                  | 0    | 0    |

## SECTION II. MARKET SECTOR OPPORTUNITIES AND THREATS

### 1. Entry Strategy

Fish and seafood are imported into Slovakia directly from the U.S. by air and/or from/through other EU countries, mainly because there are ports and headquarters of large multinational companies. These companies can offer better prices because they buy larger amounts of product

than small importers can. Importers usually play the role of wholesaler and distributor as well. According to Slovak importers, there are no import barriers and the U.S. product has been competitive and is well liked there.

## **2. Market Size, Structure, Trends**

The market for frozen fish and seafood in Slovakia has been steadily growing, reaching in 2006 a value of nearly 10 million USD. The market also opened to more expensive kinds of fish and seafood, especially in the hotel and restaurant sector. The most popular frozen products are fish fillets, mainly from codfish, pike and Alaska salmon.

Retail sales of chilled fish and seafood products and processed fish and seafood products including smoked fish are on the rise as well, reaching almost 15 thousand MT.

Consumption of fish and seafood in Slovakia is still very low, compared to other European countries, reaching approximately 3 kg per capita per year. The most popular products among consumers are after frozen filets, fish salads and marinated fish products.

## **3. Company Profiles**

Large importer and processor of fish and seafood in Slovakia is a company called Ryba. The affiliated company Radoma specializes in frozen products. Their portfolio of products includes frozen and chilled products from fish and seafood, potatoes, vegetables, ready-to-eat meals and canned fish products.

The competition has been increasing with many other companies coming into the market. There are also companies focusing mainly on processing, for example Partners and branches of large Czech companies for example company Nowaco or processing Delimax.

## **SECTION III. COSTS AND PRICES**

Slovakia went successfully through a tax reform and now has a flat VAT rate at 19%. The previous lower VAT rate of 14% was canceled and the basic VAT rate of 20% went down by 1% in 2004. The introduction of a single 19% VAT flat rate increased prices of all goods and services, which were taxed by the lower VAT rate.

### **Retail Prices**

The retail margin for frozen fish and seafood products ranges usually between 10% and 30%. There has been a pressure on low retail prices, as the purchasing power of Slovaks remains weak.

### **Import Tariff Rates**

Since 2004 Slovakia has been a member of the EU and therefore all EU rules and rates apply. Import tariff rates for fish and seafood vary from 2 to 10%. However, for most of the fish it is 2% and the higher rates apply for some crustaceans and mollusks. Import tariff rates of the EU for any product can be found at [http://ec.europa.eu/taxation\\_customs/dds/cgi-bin/tarchap?Lang=EN](http://ec.europa.eu/taxation_customs/dds/cgi-bin/tarchap?Lang=EN).

## **SECTION IV. MARKET ACCESS**

For information on import regulations, standards, and procedures see the FAIRS (Food and Agricultural Import Regulations and Standards) report available under number LO6004 at <http://www.fas.usda.gov/scripts/attacherep/default.asp>.

## SECTION V. KEY CONTACTS AND FURTHER INFORMATION

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